




March 2000 Hot Topics

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### **e-file for Individual Taxpayers**

A quick, easy, smart way to get your taxes where you want them to be --- Done! Check out [Free File](#) your link to free online filing.

### **e-file for Business and Self-Employed Taxpayers**

Electronic filing and payment options for businesses including employment taxes, inform returns, partnerships, corporations, and estates & trusts.

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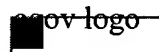
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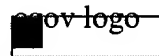
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- **Select a file format.** For additional information about a format click on the forma name below. (PDF format allows you to view your form electronically on most computers. The [freely available](#) Adobe Acrobat reader is required to view and pr PDF files.)
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Current File Format: pdf

See a [list of available sgml \(Instructions Only\) files](#).

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2003 Form CT-1 Employer's Annual Railroad Retirement Tax Re...  
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 0104 Form CT-2 Employee Representative's Quarterly Railroad...  
 0504 Form FinCEN101 Suspicious Activity Report - Securities ...  
 0504 Form FinCEN101A Suspicious Activity Report - Securities...  
 1203 Form FinCEN103N Currency Transaction Report by Casinos...  
 0703 Form FinCEN105 Report of International Transportation o...  
 0403 Form FinCEN102 Suspicious Activity Report - Casinos and...  
 0403 Form FinCEN102A Instructions  
 0303 Form FinCEN103 Currency Transaction Report by Casinos  
 1203 Form FinCEN104 Currency Transaction Report  
 0502 Form SS-10 Consent to Extend Time to Assess Employment ...



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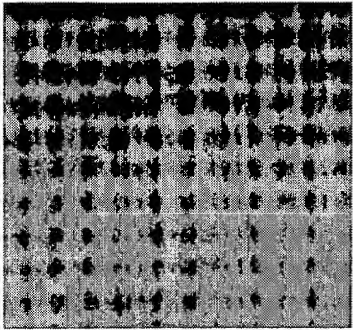
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 0403 Form FinCEN102 Suspicious Activity Report - Casinos and...  
 0403 Form FinCEN102A Instructions  
 0303 Form FinCEN103 Currency Transaction Report by Casinos  
 1203 Form FinCEN104 Currency Transaction Report  
 0502 Form SS-10 Consent to Extend Time to Assess Employment ...

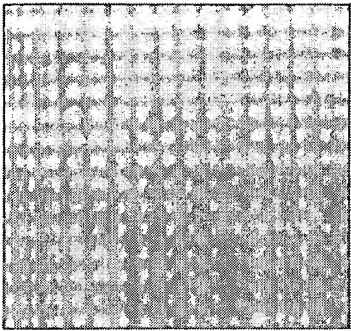


0502 Form SS-10 Consent to Extend Time to Assess Employment ...	
0102 Form SS-16 Certificate of Election of Coverage	
0903 Inst SS-4 Instructions	
1201 Form SS-4 Application for Employer Identification Numb...	
0903 Inst SS-4PR Instrucciones	
1201 Form SS-4PR Solicitud de Numero de Identificacion Patr...	
1102 Form SS-5 Application for a Social Security Number Car...	▼

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## Forms W-2 Are Required

When filing electronically taxpayers must provide Forms W-2, W-2G, and 1099-R to the Authorized IRS e-file Provider before the Provider sends the electronic return to the IRS. Providers are prohibited from submitting electronic returns to the IRS prior to receipt of a Forms W-2, W-2G, and 1099-R from the taxpayer. Taxpayers filing electronic returns using a personal computer enter the data from the forms into the electronic filing software themselves. This is similar to the attachment of Forms W-2, W-2G, and 1099-R to the face of paper tax returns. Taxpayers who have not received Forms W-2 from their employers and want to know what to do may obtain information [here](#).

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## Tax

### Topic 154 - 2003 Forms W-2 and Form 1099-R (What to Do if Not Received)

In general, employers/payers must provide employees with 2003 [Form W-2](#) (PDF), [Wage and Tax Statement](#); [Form 1099-R](#) (PDF), [Distributions From Pensions, Annuities, Retirements or Profit-Sharing Plans, IRA's, Insurance Contracts](#); [Form 1099-INT](#) (PDF), [Interest Income](#), or [Form 1099-MISC](#) (PDF), [Miscellaneous Income](#) by January 31, 2004. Employers/payers have the option of making the information available on a website. However, if you leave your employer before the end of the calendar year, and request your Form W-2 or Form 1099-R at that time, your employer must provide your form within 30 days of your request. If you do not receive Form W-2 or Form 1099-R, you still must file your return on time.

Therefore, after January 31, 2004, if you have not received Form W-2 or Form 1099-R, or the information on a website, or received an incorrect form or information you should contact your employer/payer. You may not have received your form because of an incorrect or incomplete address. Be sure to verify the address used if already mailed. If the form was returned to your employer/payer because of an incorrect address, or never mailed, and the employer/payer intends to issue or re-mail a reasonable amount of time for this action to occur before calling the IRS for help.

After February 14, 2004, the IRS will help you obtain the missing forms. Call 1-800-829-1040. Be prepared to provide your name, address (including zip code), phone number, Social Security Number, and dates of employment and the name, address (including zip code), and phone number of the employer/payer.

The IRS will send the employer/payer a Form 4598, Form W-2, [Form 1098](#) (PDF) or Form 1099, *Not Received, Incorrect, or Lost*. You will receive a copy, along with [Form 4852](#) (PDF), *Substitute for Form W-2 or Form 1099-R*, and a [Form 1040X](#) (PDF), *Amended U.S. Individual Income Tax Return*. If you do not receive the Form W-2 or Form 1099-R in sufficient time to file timely, you may file using Form 4852.

If you later receive a Form W-2 or Form 1099-R, after your return is filed using substitute information, and the information differs from the information reported on your return, you must file an amended return. For more information on amending your return, refer to [Topic 308](#).

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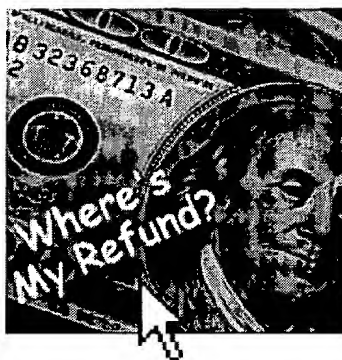
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## Indiv

### Where's My Refund?



You filed your tax return and you're expecting a refund. You have just one question and you want the answer now - Where's My Refund?

Access this secure Web site to find out if the IRS received your return and whether your refund was processed and sent to you.

To get to your refund status, you'll need to provide the following information as shown on your return:

- Your Social Security Number (or IRS Individual Taxpayer Identification Number)
- Your Filing Status, (Single, Married Filing Joint Return, Married Filing Separate Return, Head of Household, or Qualifying Widow(er))
- The Refund amount (It is important to enter the refund amount exactly as it is shown on your return in order for our computer system to retrieve your data)

Okay now, [Where's My Refund?](#)

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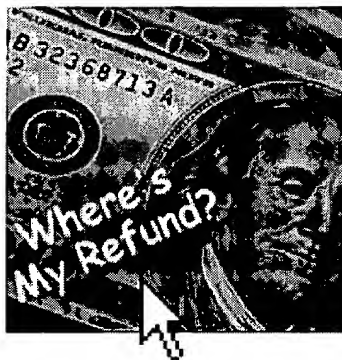
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## Refun

### Get Refund Status

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\*See our [Privacy Notice](#) regarding our request for your personal information.



#### Social Security Number

or IRS Individual Taxpayer Identification  
Number shown on your tax return.

 -  - 

#### Filing Status

Please select the Filing Status  
shown on your tax return.

- ☐ Single
- ☐ Married-Filing Joint Return
- ☐ Married-Filing Separate Return
- ☐ Head of Household
- ☐ Qualifying Widow (er)



#### Refund Amount

You must enter the exact whole dollar amount  
shown on your tax return. Providing the exact whole dollar  
amount is essential to receiving the correct response.

\$



Note: For security reasons, we recommend that you close your browser after you have finished accessing your refund.

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JANUARY 1999  
FS-1999-03

## E-FILE -- A PROVEN ALTERNATIVE

Filing a federal tax return electronically has never been simpler or more convenient. Twenty-five million taxpayers took advantage of IRS's e-file options last year. They learned that filing through an authorized practitioner, over the telephone or on-line is fast, safe and virtually error-proof.

Beginning with the 1999 tax filing season, the IRS is launching a number of programs that will make e-filing even more rewarding. Two new taxpayer signature pilots will provide a totally paperless experience for some electronic filers. Also new this year, taxpayers filing electronically can pay any balance due with a credit card or direct debit from their checking or savings account.

Aside from ease of filing, TeleFile, e-file using a practitioner, or e-file using a personal computer offer such benefits as:

- **Faster refunds:** IRS e-file is the quickest way to get refunds. Taxpayers receive refunds in half the time as paper returns -- even faster with direct deposit.
- **More accurate returns:** IRS e-file returns are more accurate and reduce the chance of getting an error letter from the IRS.
- **Quick electronic confirmation:** The IRS e-file options provide acknowledgment that the return has been accepted. The TeleFile system gives callers a confirmation number while they're on the phone to let them know that they have completed the filing of their returns. With e-filing, taxpayers know their return made it to the IRS.
- **Ease of payment:** Form 1040 e-filers with a balance due can pay their taxes with a credit card. Taxpayers using an authorized IRS e-file provider, tax preparation software or TeleFile can pay all or a portion of their tax bill by credit card using a touch-tone phone. Mastercard cards, American Express or Discover/NOVUS cards will be accepted. In almost all tax preparation software, taxpayers will be able to choose to pay by pre-authorizing a debit from a checking or savings account. Whatever the method of electronic payment, it is now easier than ever to file and pay at the same time--avoiding a trip to the post office. Taxpayers also have the opportunity to "file now and pay later."

(more)

Taxpayers with a balance due can e-file in January, receive confirmation, then delay actual payment until April 15.

- **No paper:** This year, eligible taxpayers will be able to sign their returns with an alternative method that eliminates the need to mail a paper signature to the IRS. The IRS is distributing over 8 million postcards with e-file Customer Numbers (ECN) to taxpayers who prepare their own returns using tax preparation software and file from their home computers. These taxpayers will use the ECN codes as their electronic signatures. In addition, approximately 8,100 practitioners will participate in a pilot where taxpayers will chose a Personal Identification Number to use when filing through a tax preparer.

## **TELEFILE**

Nearly 6 million people learned last year that TeleFile, the IRS' telephone filing system, is the easiest way to file a return. Eligible TeleFile users receive a special tax package allowing them to file their taxes quickly and easily any hour of the day or night. Instead of tax forms, this package has a worksheet which becomes the TeleFile Tax Record and a personal identification (PIN) that acts as the taxpayer's signature. If there are no changes to the name or address that the IRS has printed on the Tax Record and the taxpayer is otherwise eligible, TeleFile is the easiest way to file. Those who are due a refund may have it deposited directly to a checking or savings account.

With a Touch-Tone phone, TeleFilers enter interest income, any unemployment compensation and wages, tax withheld and employer identification number from each W-2 Form. Those taking advantage of direct deposit also enter a bank routing number and account number. The telephone call takes about 10 minutes. The IRS figures the adjusted gross income, standard deduction, exemption, taxable income, tax, and any earned income credit. Plus any refund or tax due, while the taxpayer is on the phone. Refunds will be sent in half the time as a paper return--even earlier for direct deposit--and any tax due can be paid by April 15, 1999.

This year, taxpayers in Indiana and Kentucky will be able to file both their federal and state returns with a single phone call using TeleFile.

## **E-FILING USING A TAX PROFESSIONAL**

E-filing in which authorized participants send tax filing data for their clients to the IRS from their computers is available for balance due as well as refund returns. This means if taxpayers owe money, they can file returns earlier while still making tax payments by April 15, 1999. For refund taxpayers, e-filing means a faster refund, with the option of having it deposited directly into their bank accounts.

(more)



Taxpayers can prepare their own returns and have professionals e-file it, or they can have a professional prepare and e-file their returns.

First tested in 1986, e-filing through a professional grew to over 17 million individual returns in 1998.

Many taxpayers in 35 states and the District of Columbia can file their federal and state tax returns electronically in one transmission to the IRS. The IRS forwards the state data to the appropriate state tax authority. This federal-state electronic filing is available in Alabama, Arizona, Arkansas, Colorado, Connecticut, Delaware, Georgia, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maryland, Michigan, Mississippi, Missouri, Montana, Nebraska, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, Utah, Virginia, West Virginia, Wisconsin and the District of Columbia. Last year over 6 million e-filers filed their state returns with their federal returns.

## **E-FILING USING A PERSONAL COMPUTER**

Taxpayers who have a modem and personal computer can e-file their tax returns directly from home. Participating tax preparation software programs or tax preparation Internet websites include an e-file option through a contract transmitter.

To e-file from home, a taxpayer transmits a completed tax return file to a transmitter, which converts the file from the tax preparation software's or Internet services' format to the IRS's format. The transmitter then sends the converted return file to the IRS. The IRS will notify the taxpayer through the transmitter whether or not the return is accepted. In 1998, nearly one million e-filers sent their returns via their home computers.

Interested computer users can get a list of participating software companies through the IRS website at: [www.irs.ustreas.gov](http://www.irs.ustreas.gov) or directly by modem at 703-321-8020. Through partnerships with the private sector, the IRS website also provides direct links to selected tax software firms' who offer low- or no-cost filing options.

## **A PROVEN PRODUCT**

The benefits of e-file are clear.

- a fast refund in half the time -- even faster with direct deposit
- faster processing and better accuracy
- acknowledgment of receipt within 48 hours

(more)

One out of every 5 taxpayers chose e-filing last year. No matter which e-file method taxpayers select, the track record is proven -- e-file provides secure, accurate, fast and easy income tax filing.

X X X

**JANUARY 1999**  
**FS-1999-03**

## **E-FILE -- A PROVEN ALTERNATIVE**

Filing a federal tax return electronically has never been simpler or more convenient. Twenty-five million taxpayers took advantage of IRS's e-file options last year. They learned that filing through an authorized practitioner, over the telephone or on-line is fast, safe and virtually error-proof.

Beginning with the 1999 tax filing season, the IRS is launching a number of programs that will make e-filing even more rewarding. Two new taxpayer signature pilots will provide a totally paperless experience for some electronic filers. Also new this year, taxpayers filing electronically can pay any balance due with a credit card or direct debit from their checking or savings account.

Aside from ease of filing, TeleFile, e-file using a practitioner, or e-file using a personal computer offer such benefits as:

- **Faster refunds:** IRS e-file is the quickest way to get refunds. Taxpayers receive refunds in half the time as paper returns -- even faster with direct deposit.
- **More accurate returns:** IRS e-file returns are more accurate and reduce the chance of getting an error letter from the IRS.
- **Quick electronic confirmation:** The IRS e-file options provide acknowledgment that the return has been accepted. The TeleFile system gives callers a confirmation number while they're on the phone to let them know that they have completed the filing of their returns. With e-filing, taxpayers know their return made it to the IRS.
- **Ease of payment:** Form 1040 e-filers with a balance due can pay their taxes with a credit card. Taxpayers using an authorized IRS e-file provider, tax preparation software or TeleFile can pay all or a portion of their tax bill by credit card using a touch-tone phone. Mastercard cards, American Express or Discover/NOVUS cards will be accepted. In almost all tax preparation software, taxpayers will be able to choose to pay by pre-authorizing a debit from a checking or savings account. Whatever the method of electronic payment, it is now easier than ever to file and pay at the same time--avoiding a trip to the post office. Taxpayers also have the opportunity to "file now and pay later."

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Taxpayers with a balance due can e-file in January, receive confirmation, then delay actual payment until April 15.

- **No paper:** This year, eligible taxpayers will be able to sign their returns with an alternative method that eliminates the need to mail a paper signature to the IRS. The IRS is distributing over 8 million postcards with e-file Customer Numbers (ECN) to taxpayers who prepare their own returns using tax preparation software and file from their home computers. These taxpayers will use the ECN codes as their electronic signatures. In addition, approximately 8,100 practitioners will participate in a pilot where taxpayers will chose a Personal Identification Number to use when filing through a tax preparer.

## **TELEFILE**

Nearly 6 million people learned last year that TeleFile, the IRS' telephone filing system, is the easiest way to file a return. Eligible TeleFile users receive a special tax package allowing them to file their taxes quickly and easily any hour of the day or night. Instead of tax forms, this package has a worksheet which becomes the TeleFile Tax Record and a personal identification (PIN) that acts as the taxpayer's signature. If there are no changes to the name or address that the IRS has printed on the Tax Record and the taxpayer is otherwise eligible, TeleFile is the easiest way to file. Those who are due a refund may have it deposited directly to a checking or savings account.

With a Touch-Tone phone, TeleFilers enter interest income, any unemployment compensation and wages, tax withheld and employer identification number from each W-2 Form. Those taking advantage of direct deposit also enter a bank routing number and account number. The telephone call takes about 10 minutes. The IRS figures the adjusted gross income, standard deduction, exemption, taxable income, tax, and any earned income credit. Plus any refund or tax due, while the taxpayer is on the phone. Refunds will be sent in half the time as a paper return--even earlier for direct deposit--and any tax due can be paid by April 15, 1999.

This year, taxpayers in Indiana and Kentucky will be able to file both their federal and state returns with a single phone call using TeleFile.

## **E-FILING USING A TAX PROFESSIONAL**

E-filing in which authorized participants send tax filing data for their clients to the IRS from their computers is available for balance due as well as refund returns. This means if taxpayers owe money, they can file returns earlier while still making tax payments by April 15, 1999. For refund taxpayers, e-filing means a faster refund, with the option of having it deposited directly into their bank accounts.

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Taxpayers can prepare their own returns and have professionals e-file it, or they can have a professional prepare and e-file their returns.

First tested in 1986, e-filing through a professional grew to over 17 million individual returns in 1998.

Many taxpayers in 35 states and the District of Columbia can file their federal and state tax returns electronically in one transmission to the IRS. The IRS forwards the state data to the appropriate state tax authority. This federal-state electronic filing is available in Alabama, Arizona, Arkansas, Colorado, Connecticut, Delaware, Georgia, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maryland, Michigan, Mississippi, Missouri, Montana, Nebraska, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, Utah, Virginia, West Virginia, Wisconsin and the District of Columbia. Last year over 6 million e-filers filed their state returns with their federal returns.

## **E-FILING USING A PERSONAL COMPUTER**

Taxpayers who have a modem and personal computer can e-file their tax returns directly from home. Participating tax preparation software programs or tax preparation Internet websites include an e-file option through a contract transmitter.

To e-file from home, a taxpayer transmits a completed tax return file to a transmitter, which converts the file from the tax preparation software's or Internet services' format to the IRS's format. The transmitter then sends the converted return file to the IRS. The IRS will notify the taxpayer through the transmitter whether or not the return is accepted. In 1998, nearly one million e-filers sent their returns via their home computers.

Interested computer users can get a list of participating software companies through the IRS website at: [www.irs.ustreas.gov](http://www.irs.ustreas.gov) or directly by modem at 703-321-8020. Through partnerships with the private sector, the IRS website also provides direct links to selected tax software firms' who offer low- or no-cost filing options.

## **A PROVEN PRODUCT**

The benefits of e-file are clear.

- a fast refund in half the time -- even faster with direct deposit
- faster processing and better accuracy
- acknowledgment of receipt within 48 hours

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One out of every 5 taxpayers chose e-filing last year. No matter which e-file method taxpayers select, the track record is proven -- e-file provides secure, accurate, fast and easy income tax filing.

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